

7.0

Reports/Queries

Queries and Reports menu options are valuable tools used to obtain important information that will help you manage your cases.

This section will cover running the more common reports. You should explore the other options available to take full advantage of the reporting capabilities within CM/ECF.

Please note that to access either the Reports or Queries sections, you will need to login to the PACER system. You will be charged the going PACER rate. More information on cost and acquiring a PACER account can be obtained from the court's web site at www.utb.uscourts.gov

This chapter will cover:

1. Cases Report
2. Docket Reports
3. Queries

7.1

Cases Report

The cases report presents information from the court's database with a variety of selection criteria for case management and tracking.

STEP 1 Click on the Reports hyperlink on the blue bar. Click on the Cases hyperlink. This will bring up the PACER login. Enter your PACER login information and click on the [Login] button.

STEP 2 With the Cases Report screen up (below), select the fields that you want to use to generate your report. Click on the [Run Report] button to generate your case report.

Cases Report

Office: Salt Lake City Case Type: ap/bk Chapter: 7/9

Trustee: Anderson, Kevin R., Bailey, Steven R.

Date Type: Filed Date From: 1/1/2002 to: 8/1/2002

☒ Open cases ☒ Party information

☒ Closed cases

Sort by: Filed Date

Run Report Clear

Report Fields

- **Case Type:** ap—adversary proceeding or bk—bankruptcy. Default is **all** types.
- **Chapter:** 7, 9, 11, 12, 13 or 304. Default is **all** chapters.
- **Trustees:** Default is **all** trustees.
- **Date Type:** Filed, Entered, Discharged, Dismissed, Closed, Converted. Default is **Filed Date**.
- **From/to:** Enter a beginning and/or ending date. For a single day's activity, enter that date into both fields.
- **Open Cases:** show open cases. Default is **Open Cases**.
- **Closed Cases:** to include or exclude closed cases. Default is **no** closed cases.
- **Party Information:** check this box to show party name, address, SSN and Tax ID.
- **Sort by:** select up to three sorting orders—Filed Date, Entered Date, Case Number, Case Type, or Office. Default is **Filed Date**.

This is the Cases Report. The size of the report is based on the fields that you selected in STEP 2.

Case Number. Clicking on this link will generate a Docket Report.

Party Name. This shows party information (Party Information was checked on the fields screen).

Event dates

Other case information.

Case Number	Party Name	Event dates	Other case information.
02-20003	Harvey Smithson William Jones	Filed: 03/05/2002 Discharged: 11/18/2002	Office: Salt Lake City Asset: No Fee: Paid
02-20004	Susan Ann Smith 1445 South 1500 East Salt Lake City, UT 84111 SSN: 528-44-5555	Filed: 03/07/2002	Office: Salt Lake City Asset: No Fee: Paid County: Salt Lake
02-20005	Edward Pakenham 2584 E New Orleans Ct Salt Lake City, UT 84115 SSN: 265-48-7521	Filed: 03/19/2002 Dismissed: 10/17/2002	Office: Salt Lake City Asset: No Fee: Paid County: Salt Lake
	Sarah Pakenham 2584 E New Orleans Ct Salt Lake City, UT		

Notice the discharge and dismiss dates. Other information such as Converted and Closed etc. may also appear.

Judge and Trustee assigned to the case.

7.2

Docket Report

The Docket Report, also known as a Docket Sheet, lists all the events that occur to a particular case. From the ECF Docket Report, you can access the documents that created those events.

As with the Cases Report, the Docket Report is under the Reports hyperlink.

STEP 1 Click on the Reports hyperlink on the blue bar. Click on the Docket Reports hyperlink. Enter your PACER login information and click on the [Login] button.

STEP 2 With the Docket Report screen up (below), select the fields that you want to use to generate you report. Click on the [Run Report] button to generate your docket report.

The screenshot shows the 'Docket Sheet' form. It has a title bar 'Docket Sheet' in blue. The form contains several input fields and checkboxes. The 'Case number' field is filled with '02-20105'. The 'Filed' radio button is selected, and the date range is '1/16/2002' to '7/15/2003'. The 'Entered' radio button is unselected. The 'Documents' field is empty. There are two checkboxes: 'Include terminated parties' and 'Include links to Notice of Electronic Filing', both of which are checked. The 'HTML' radio button is selected, and the 'Text' radio button is unselected. The 'Sort by' dropdown menu is set to 'Most recent date first'. At the bottom, there are two buttons: 'Run Report' and 'Clear'.

Report Fields

Case Number: since you are looking at a specific case, you need to enter a case number (using the standard YY-NNNNN format). This is a required field.

Entered/Filed: To limit which entries are shown by date, select either “Entered” (when the entry was recorded by the court in CM/ECF) or Filed (when the document was filed). Enter the start and stop date in the format MM/DD/YY or MM/DD/YYYY.

Documents: limit entries by document number, enter the beginning and ending numbers.

Include terminated parties: include any parties that have been terminated from the case. Uncheck the box to show only current parties in the case.

Include links to Notice of Electronic Filing: Notice provided at the end of each docket entry.

Sort by: This selection allows you to sort the entries in the report by “oldest date first” or “Most recent date first”. This can also affect the number of pages and PACER charges if you are interested only in the most current activity.

This is the Docket Report. The size of the report is based on the fields that you selected in STEP 2.

Case **flags** which could include dismissed, discharged, 727 objection to discharge, etc.

Counsel of record for party on left.

Basic case information:
Chapter, Judge, Trustee, debtors

Case number

**U.S. Bankruptcy Court
District of Utah (Salt Lake City)
Bankruptcy Petition #: 03-50001**

Assigned to: William T. Thurman
Chapter 7
Voluntary
No asset

Date Filed: 07/14/2003

represented by Kevin Whatcott

represented by Kevin Whatcott

Debtor
Douglas Done
1125 W. 2995 S.
West Valley City, UT 84119
SSN: 529-66-1396

Debtor
Denise Done
1125 W. 2995 S.
West Valley City, UT 84119
SSN: 564-56-5425

Debtor
R. Kimball Mosier
Parsons Davies Kinghorn & Peters
185 South State Street
Suite 700
Salt Lake City, UT 84111

Date on Pleading.

Radio button will reproduce actual **Notice of Electronic Filing** displayed at the time the document was entered.

Document numbers as- signed to document. If there is a hyperlink number, clicking on the number will bring up the document.

Date document was **entered** on docket sheet. Pleadings entered by court may be entered next day.

Docket Text.

Date	Document Number	Docket Text
		(mmbaty,) (Entered: 03/10/2003)
03/06/2003	51	Objection to (related document(s): 23 Motion for Relief From Stay) Filed by Cyprus Credit Union (mmbaty,) (Entered: 03/06/2003)
03/06/2003	50	Objection to (related document(s): 23 Motion for Relief From Stay) Filed by Zions First National Bank (mmbaty,) (Entered: 03/06/2003)
03/05/2003	49	Objection to (related document(s): 47 Motion to Assume or Reject, Motion for Relief From Stay) Filed by Wells Fargo Bank (mmbaty,) (Entered: 03/05/2003)

7.3

Query

The query feature provides a number of options to query the District of Utah database for case information on a particular case including case number, associated adversary cases, attorneys, deadlines, docket report, etc. These query reports are printable.

STEP 1 Click on the Query hyperlink on the blue bar. Enter your PACER login information and click on the [Login] button.

STEP 2 With the Query Search screen up (see figure 1), enter your desired search information into the fields that you want to use to generate you query. Click on the [Run Query] button.

District of Utah - ECF Database - Netscape

Back Forward Reload Home Search Netscape Print Security Shop

Instant Message WebMail Radio People Yellow Pages Download Calendar Channels

Bookmarks Location https://ecf-tran.utb.uscourts.gov/cgi-bin/login.pl?31176735073754_316_01 What's Related

ECF Bankruptcy Adversary Query Reports Utilities Logout

Query

Search Clues

Case Number (Example: 99-80013)

Last Name (Examples: Desoto, Des*t)

First Name Middle Name

SSN Tax ID

Type

Document Done

Figure 1

Query Events

Aliases

Lists all aliases for all parties related to the case.

Associated Cases

All cases associated with this case, usually Adversary cases.

Attorneys

All attorneys associated with this case.

Case Summary

Displays a summary of events for the case, including dates, flags, pending status, attorney.

Creditors

A Creditor Type selection screen will be displayed, choose from: **Creditors, Administrative, 20 Largest Unsecured Creditors, Limited Notice**, and **Notice of Appearance**. Or you can select nothing and get the whole listing. For a Mailing matrix select Mailing Matrix by Case under Reports.

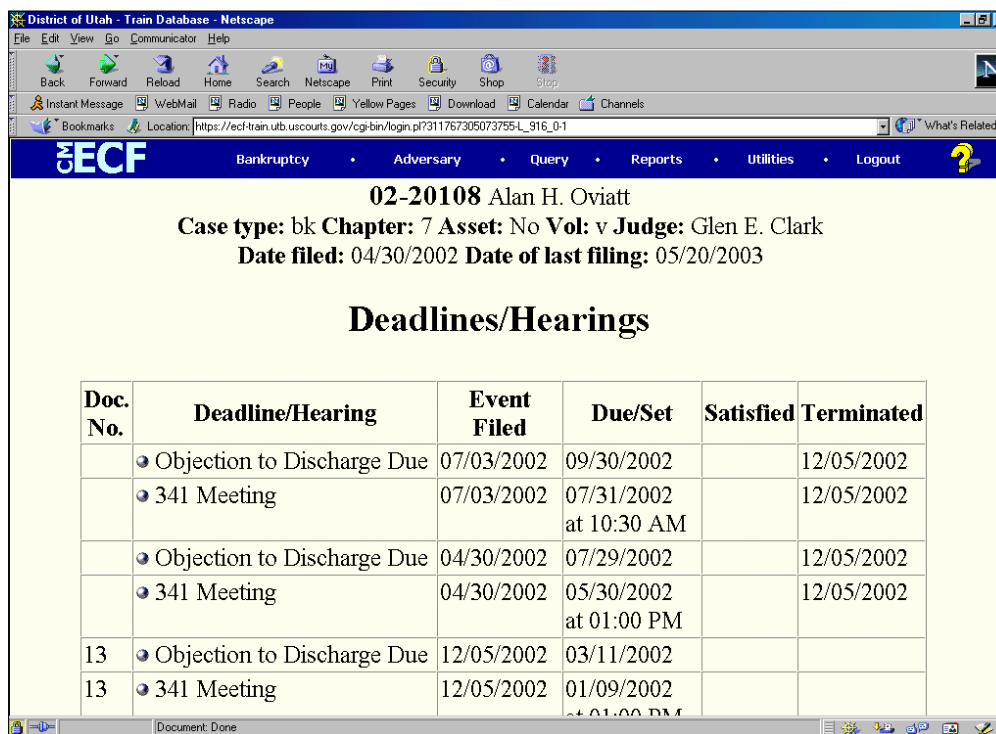
After running this Query, you will get a listing of **creditors** according to your selected creditor type.

Deadlines/Hearings

A Deadlines/Hearing sort query screen is displayed. You can sort by: **Document Number, Deadline/Hearing, Filed, Due/Set** (default), **Satisfied**, and **Terminated**, in three fields. The query will be performed on your first sort setting, and then by the next sort setting through the three sorts, if you set that many.

Click on the [Run Query] button to bring up the Deadlines and Hearings report (see figure 2).

Clicking on a “silver bullet” will bring up the Docket Information and Related Docket Entries screen.



02-20108 Alan H. Oviatt
Case type: bk Chapter: 7 Asset: No Vol: v Judge: Glen E. Clark
Date filed: 04/30/2002 Date of last filing: 05/20/2003

Deadlines/Hearings

Doc. No.	Deadline/Hearing	Event Filed	Due/Set	Satisfied	Terminated
	• Objection to Discharge Due	07/03/2002	09/30/2002		12/05/2002
	• 341 Meeting	07/03/2002	07/31/2002 at 10:30 AM		12/05/2002
	• Objection to Discharge Due	04/30/2002	07/29/2002		12/05/2002
	• 341 Meeting	04/30/2002	05/30/2002 at 01:00 PM		12/05/2002
13	• Objection to Discharge Due	12/05/2002	03/11/2002		
13	• 341 Meeting	12/05/2002	01/09/2002 at 01:00 PM		

Figure 2



Section 7.3: Query

Docket Report

See section **6.2: Docket Reports**

Filers

Shows all the filers for this case. Clicking on a filer hyperlink will bring up a listing of all the documents filed by that filer. Clicking on a silver bullet will bring up the Docket Information and Related Docket Entries screen.

History/Documents

A search screen is displayed, allowing you to select All events (which is a history), or just events with documents. You also have the option of displaying docket text (a longer result page). You can sort by **Oldest date first** or **Most recent date first**.

Clicking the [Run Query] button will return the History/Document results page. If you accepted the default setting, you will get a case history with silver bullets. Clicking on a silver bullet will display the docket text for that filing. Clicking on a hyperlinked number will display the document for that event.

If you opted to display docket text on the search screen, the silver bullets will not be displayed on the results screen.

Notice of Bankruptcy Case Filing

This is a copy of the Electronic Notice of Case Filing, which was generated when the case was opened.

Parties

Displays all parties associated with the case, along with addresses and party roles, and who they are represented by.

Related Transactions

A query search screen allows you to search for related transactions by a **Filed** date range, **Documents** number range, **Document type** and **Document subtype** (motions, orders, pending, terminated). The query can be sorted by **Filed Date**, **Entered Date**, and **Document Number**.

Clicking on the [Run Query] button will return the related transactions report. This is a listing of transaction that relate or refer to each other, such as motions and objections to those motions.

Clicking on the silver bullet will display the Docket Information and Related Docket Entries screen.

Status

This will display all events that are awaiting an action. Clicking on the silver bullet will display the Docket Information and Related Docket Entries screen.

Trustee

Displays the trustee assigned to the case.

